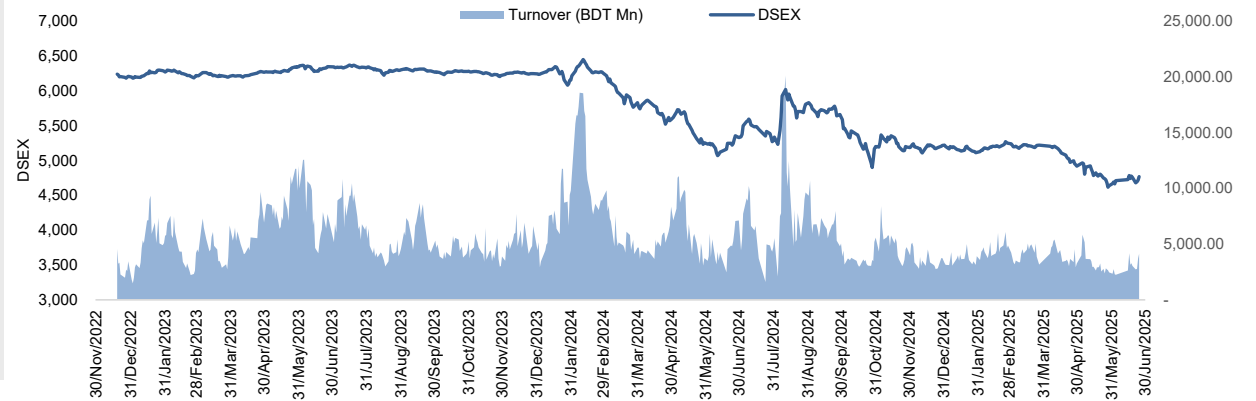


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.06%) gained 49.98 points and closed at 4,767.64. The blue-chip index DS30 (+1.05%), the Shariah-based index DSES (+1.46%), and the large-cap index CDSET (+0.62%) closed at 1,790.09, 1,046.04, and 977.52 points, respectively. All the large-cap sectors posted positive performance today. Engineering booked the highest gain of 1.65% followed by NBF1 (+1.46%), Pharmaceutical (+1.07%), Fuel & Power (+0.81%), Bank (+0.57%), Food & Allied (+0.42%), and Telecommunication (+0.12%), respectively. Block trades contributed 7.1% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (-1.6%) was the most traded share with a turnover of BDT 274 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,767.64	4,717.66	+49.98	+1.06%	-8.6%
DS30	1,790.09	1,771.52	+18.58	+1.05%	-7.7%
DSES	1,046.04	1,031.02	+15.03	+1.46%	-10.5%
CDSET	977.52	971.47	+6.05	+0.62%	-8.3%

Figure: Sectorial Turnover (BDT Mn)

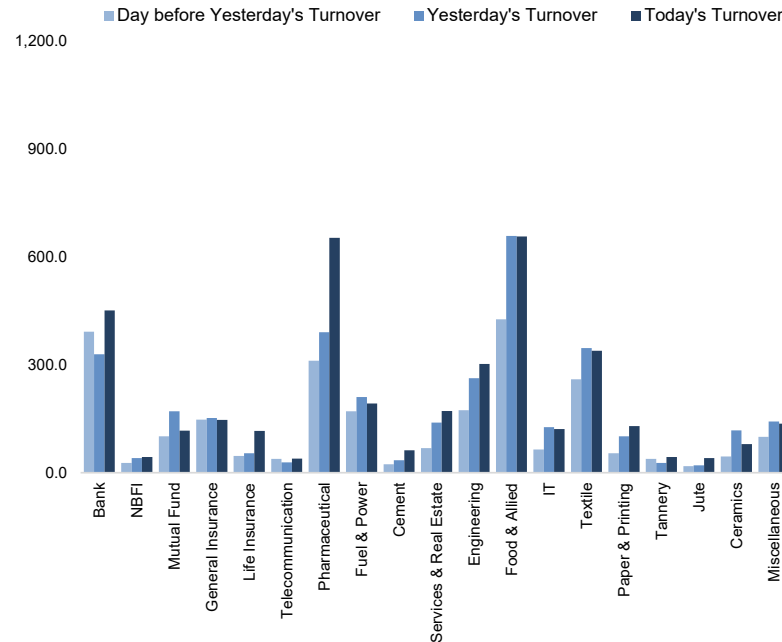
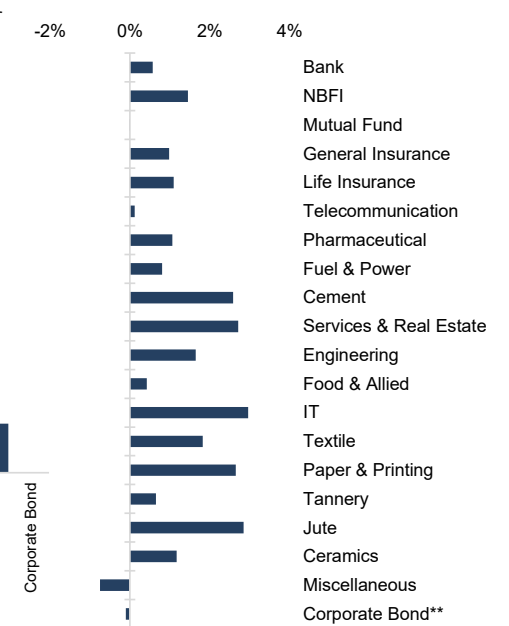


Figure: Sectorial Mcap Change



	Advanced	Declined	Unchanged	Total
All Category	295	46	59	400
A Category (Equity)	159	25	36	220
B Category (Equity)	68	11	5	84
N Category (Equity)	0	0	0	0
Z Category (Equity)	68	10	18	96
Mutual Funds	13	6	17	36
Corporate Bonds	1	2	3	6
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,576,861	6,541,686	+0.5%
	Mn USD	53,587	53,301	
Turnover	Mn BDT	4,132	3,727	+10.9%
	Mn USD	34	30	
Volume	Mn Shares	147	142	+3.7%
No. of Trade		134,535	116,813	+15.2%

* Average Interbank Exchange Rate is BDT 122.73 as of Jun 25, 2025

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Market PE 12.9x
Market PB 1.1x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, NBF1, ABBANK, IFIC, FIRSTSBANK and NBL

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,295	1,288	+7.37	+0.57%	36	612,793	9.4%	450.7	11.7%	17.8x	0.6x	GP	399,419	12.3%	13.7	13.7x	5.6x
NBFI	916	903	+13.14	+1.46%	23	87,322	1.3%	43.8	1.1%	NM	NM	SQRPHARMA	181,900	5.6%	196.9	7.7x	1.4x
Mutual Fund	601	601	-0.10	-0.02%	37	27,625	0.4%	117.1	3.1%	NM	0.5x	BATBC	147,204	4.5%	66.6	8.9x	2.8x
General Insurance	2,392	2,368	+23.34	+0.99%	43	68,259	1.0%	146.3	3.8%	11.4x	1.0x	ROBI	126,758	3.9%	19.5	17.5x	1.8x
Life Insurance	1,539	1,522	+16.75	+1.10%	15	40,938	0.6%	116.3	3.0%	NM	NM	WALTONHIL	124,019	3.8%	15.6	9.6x	1.1x
Telecommunication	4,674	4,668	+5.62	+0.12%	3	548,042	8.4%	39.2	1.0%	14.5x	3.5x	BEXIMCO	103,850	3.2%	0.0	NM	1.3x
Pharmaceutical	2,751	2,722	+29.05	+1.07%	34	521,615	8.0%	652.3	17.0%	12.0x	1.4x	BRACBANK	99,347	3.1%	168.8	7.3x	1.2x
Fuel & Power	1,050	1,042	+8.40	+0.81%	23	278,238	4.3%	192.2	5.0%	17.5x	0.6x	BERGERPBL	79,380	2.4%	13.2	23.1x	5.5x
Cement	1,768	1,723	+44.57	+2.59%	7	84,256	1.3%	62.1	1.6%	20.2x	1.8x	MARICO	74,523	2.3%	20.4	12.6x	9.9x
Services & Real Estate	911	887	+24.04	+2.71%	9	50,080	0.8%	171.0	4.5%	23.0x	0.4x	UPGDCL	68,462	2.1%	7.9	5.9x	1.6x
Engineering	2,228	2,191	+36.14	+1.65%	42	251,285	3.8%	301.7	7.9%	11.5x	0.8x	LHB	54,352	1.7%	35.6	15.1x	2.7x
Food & Allied	13,970	13,912	+58.88	+0.42%	21	255,622	3.9%	656.0	17.1%	14.8x	4.1x	ISLAMIBANK	53,774	1.7%	3.6	11.5x	0.7x
IT	1,705	1,656	+49.05	+2.96%	11	22,483	0.3%	121.7	3.2%	18.9x	1.4x	UNILEVERCL	44,398	1.4%	0.2	76.4x	17.2x
Textile	991	974	+17.74	+1.82%	58	103,249	1.6%	338.8	8.8%	NM	0.7x	ICB	39,027	1.2%	8.5	NM	0.9x
Paper & Printing	3,951	3,849	+102.07	+2.65%	6	17,851	0.3%	129.3	3.4%	NM	0.8x	BXPHARMA	38,410	1.2%	26.6	6.0x	0.8x
Tannery	1,831	1,819	+11.92	+0.66%	6	20,396	0.3%	43.6	1.1%	62.7x	1.5x	DUTCHBANGL	37,605	1.2%	0.9	8.7x	0.7x
Jute	10,753	10,455	+298.03	+2.85%	3	2,367	0.0%	40.8	1.1%	NM	NM	EBL	36,225	1.1%	19.4	5.3x	0.7x
Ceramics	367	363	+4.25	+1.17%	5	16,481	0.3%	79.6	2.1%	NM	1.1x	PUBALIBANK	32,666	1.0%	3.9	4.2x	0.6x
Miscellaneous	4,087	4,118	-30.72	-0.75%	15	221,954	3.4%	136.2	3.5%	87.4x	1.8x	OLYMPIC	30,111	0.9%	3.4	16.3x	2.5x
Corporate Bond**	14,885	14,900	-15.51	-0.10%	16	32,861	0.5%	0.7	0.0%	NM	NM	CITYBANK	29,968	0.9%	53.3	3.0x	0.6x
Treasury Bond**	2,043	2,036	+7.01	+0.34%	235	3,272,174	50.1%	0.1	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
IBP	12.1	+10.0%	73.5	NM	0.9x	SQRPHARMA	108,958	7.7%	7.7x	1.4x	LOVELLO	106.8	-1.6%	274.2	48.1x	8.5x
ADNTEL	69.5	+10.0%	29.4	12.3x	2.1x	ISLAMIBANK	74,730	5.3%	11.5x	0.7x	SQRPHARMA	205.2	+0.1%	196.9	7.7x	1.4x
NEWLINE	6.8	+9.7%	7.4	NM	0.3x	BEXIMCO	69,463	4.9%	NM	1.3x	BRACBANK	49.9	+0.6%	168.8	7.3x	1.2x
CENTRALPHL	10.5	+9.4%	22.1	NM	1.5x	BATBC	50,233	3.6%	8.9x	2.8x	SEAPEARL	52.2	+0.2%	104.0	NM	3.1x
FAMILYTEX	2.4	+9.1%	0.8	NM	0.2x	WALTONHIL	46,773	3.3%	9.6x	1.1x	BEACHHATCH	45.3	+0.4%	80.7	9.7x	2.7x
BIFC	6.0	+9.09%	0.2	NM	NM	BRACBANK	46,489	3.3%	7.3x	1.2x	IBP	12.1	+10.0%	73.5	NM	0.9x
SILVAPHL	10.9	+9.0%	17.1	NM	1x	GP	44,708	3.2%	13.7x	5.6x	BATBC	272.6	+0.2%	66.6	8.9x	2.8x
BANGAS	96.2	+8.3%	26.8	NM	4.5x	RENATA	32,968	2.3%	19.8x	1.6x	ASIATICLAB	37.6	+2.2%	63.6	15.6x	0.7x
GSPFINANCE	3.9	+8.3%	0.4	NM	0.3x	BXPHARMA	23,409	1.7%	6.0x	0.8x	FINEFOODS	234.4	+0.6%	62.1	52.8x	16.1x
CVOPRL	134.1	+8.1%	33.0	50.0x	11.3x	PUBALIBANK	22,905	1.6%	4.2x	0.6x	MIDLANDBNK	23.5	-2.5%	61.6	18.5x	1.6x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	LHB	OLYMPIC	ALARABANK	BEACONPHAR	PRIMEBANK	ROBI	UTTARABANK	NBL	BSRMLTD	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
VAMLRBBF	5.5	-5.2%	0.8	NM	0.5x	20,953	20,496	18,282	17,838	16,142	14,876	13,699	13,055	12,852	BRACBANK	50.5	49.6	5.0	3,042	151.02
FBFIF	3.4	-2.9%	0.8	NM	0x	15.1x	16.3x	34.7x	28.9x	3.2x	17.5x	NM	NM	7.6x	FINEFOODS	236.0	226.0	13.0	223	51.48
FAREASTFIN	3.6	-2.7%	0.6	NM	NM	15.1x	16.3x	34.7x	28.9x	3.2x	17.5x	NM	NM	7.6x	BEACONPHAR	105.0	105.0	1.0	160	16.80
SHYAMPSUG	116.5	-2.7%	0.9	NM	NM	15.1x	16.3x	34.7x	28.9x	3.2x	17.5x	NM	NM	7.6x	MARICO	2,370.0	2,370.0	1.0	5	12.19
GREENDELMF	3.7	-2.6%	0.3	NM	0.4x	15.1x	16.3x	34.7x	28.9x	3.2x	17.5x	NM	NM	7.6x	AL-HAJTEX	122.0	118.0	5.0	93	11.09
BERGERPBL	1,711.6	-2.6%	13.2	23.1x	5.5x	15.1x	16.3x	34.7x	28.9x	3.2x	17.5x	NM	NM	7.6x	LOVELLO	111.0	98.0	8.0	79	8.06
ZAHINTEX	3.9	-2.5%	0.7	NM	0.5x	15.1x	16.3x	34.7x	28.9x	3.2x	17.5x	NM	NM	7.6x	SQRPHARMA	187.5	187.5	2.0	31	5.79
MIDLANDBNK	23.5	-2.5%	61.6	18.5x	1.6x	15.1x	16.3x	34.7x	28.9x	3.2x	17.5x	NM	NM	7.6x	QUASEMIND	28.0	28.0	1.0	189	5.29
MBL1STMF	4.1	-2.4%	0.8	NM	0.5x	15.1x	16.3x	34.7x	28.9x	3.2x	17.5x	NM	NM	7.6x	ASIATICLAB	39.5	37.9	2.0	106	4.16
STYLECRAFT	59.8	-2.3%	23.3	NM	10.3x	15.1x	16.3x	34.7x	28.9x	3.2x	17.5x	NM	NM	7.6x	BSCPLC	124.6	124.6	1.0	31	3.89

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.
 ** The base of the Bond Index starts at 100, starting from Jan 13, 2022
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BRACBANK	50.5	49.6	151.0	3,042	5
FINEFOODS	236.0	226.0	51.5	223	13
BEACONPHAR	105.0	105.0	16.8	160	1
MARICO	2,370.0	2,370.0	12.2	5	1
AL-HAJTEX	122.0	118.0	11.1	93	5
LOVELLO	111.0	98.0	8.1	79	8
SQURPHARMA	187.5	187.5	5.8	31	2
QUASEMIND	28.0	28.0	5.3	189	1
ASIATICLAB	39.5	37.9	4.2	106	2
BSCPLC	124.6	124.6	3.9	31	1
RENATA	496.2	496.2	3.0	6	1
CENTRALINS	35.2	35.2	2.8	80	1
DAFODILCOM	58.0	58.0	2.8	49	1
BSC	91.0	91.0	2.7	30	1
SHAHJABANK	14.5	14.5	2.0	137	1
AMANFEED	23.6	23.6	1.4	59	1
ACFL	15.7	15.7	1.2	74	1
IFIC	5.6	5.6	1.1	200	1
HAMI	108.0	108.0	1.1	10	1
NLTUBES	80.5	80.5	0.9	11	1
FASFIN	2.6	2.6	0.8	323	1
EMERALDOIL	22.5	22.5	0.5	24	1
Total			292.7		56

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SICL		0.0%	5.0%	Record Date	26-Jun-25
PHOENIXFIN		0.0%	0.0%	Record Date	26-Jun-25
SBACBANK		0.0%	0.0%	Record Date	26-Jun-25
NRBCBANK		0.0%	0.0%	Record Date	26-Jun-25
ABBANK		0.0%	0.0%	Record Date	26-Jun-25
PURABIGEN		0.0%	10.0%	Record Date	29-Jun-25
ALARABANK		0.0%	0.0%	Record Date	29-Jun-25
STANDBANKL		0.0%	0.0%	Record Date	29-Jun-25
MERCANBANK		0.0%	0.0%	Record Date	29-Jun-25
UCB		0.0%	0.0%	Record Date	29-Jun-25
DELTALIFE		0.0%	30.0%	Record Date	30-Jun-25
PREMIERBAN		0.0%	0.0%	Record Date	3-Jul-25
EXIMBANK		0.0%	0.0%	Record Date	10-Jul-25
DHAKAINS		0.0%	10.0%	Record Date	10-Jul-25
UNIONINS		0.0%	10.0%	Record Date	15-Jul-25

Important DSE News

SONARBAINS

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2024. Date of AGM: 11.09.2025, Time: 11:00 AM, Venue/Mode: Digital Platform. Record Date: 21.07.2025. The Company has also reported Consolidated EPS of Tk. 0.20, Consolidated NAV per share of Tk. 20.24 and Consolidated NOCFPS of Tk. 1.17 for the year ended December 31, 2024 as against Tk. 0.40, Tk. 20.62 and Tk. (0.35) respectively for the year ended December 31, 2023.

(Q1 Un-audited): Consolidated EPS was Tk. 0.44 for January-March 2025 as against Tk. 0.58 for January-March 2024. Consolidated NOCFPS was Tk. 0.19 for January-March 2025 as against Tk. 0.15 for January-March 2024. Consolidated NAV per share was Tk. 20.68 as on March 31, 2025 and Tk. 20.24 as on March 31, 2024.

MIDLANDBNK

The company has informed that the Board has appointed Mr. Md. Asraful Alam as Company Secretary (Current Charge) of the company with immediate effect.

NAVANAPHAR

The company has informed that Mrs. Saiqa Mazed has been appointed as the Chairman of the Board of the company with effect from June 24, 2025.

LHB

The company has informed that the Board of Directors of the company has approved two (02) Gas Sales Agreements (GSAs) to be executed between the Company and Jalalabad Gas Transmission and Distribution System Limited (JGTDS) for supply of natural gas to the company's plant located at Noarai, Chhatak, Sunamganj. The GSAs are effective for a term of ten (10) years from January 18, 2026 with a provision for successive renewal. This will ensure continuous energy security for the company.

DESHBANDHU

In response to DSE query letter to the company regarding news published in a newspaper titled 'Czech Republic identifies Deshbandhu as defaulter (translated to English from Bangla)' on June 18, 2025, the company has further informed DSE vide a letter that the news has no connection whatsoever with Deshbandhu Polymer Limited. Furthermore, Deshbandhu Packaging Limited has already sent a protest to the newspaper and there is no probable direct financial impact (numerical or otherwise) on Deshbandhu Polymer.

NFML

In response to a DSE query letter to the company regarding a news published in a newspaper titled 'Bank Asia to auction National Feed Mill assets over loan defaults' on June 23, 2025, the company has further informed DSE vide a letter that the news was correct and they already communicated with Bank Asia though a meeting about the issue and taking initiative to stop the auction as soon as possible.

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